

Living our Values:
2013 Failure Report

Striving for Humility

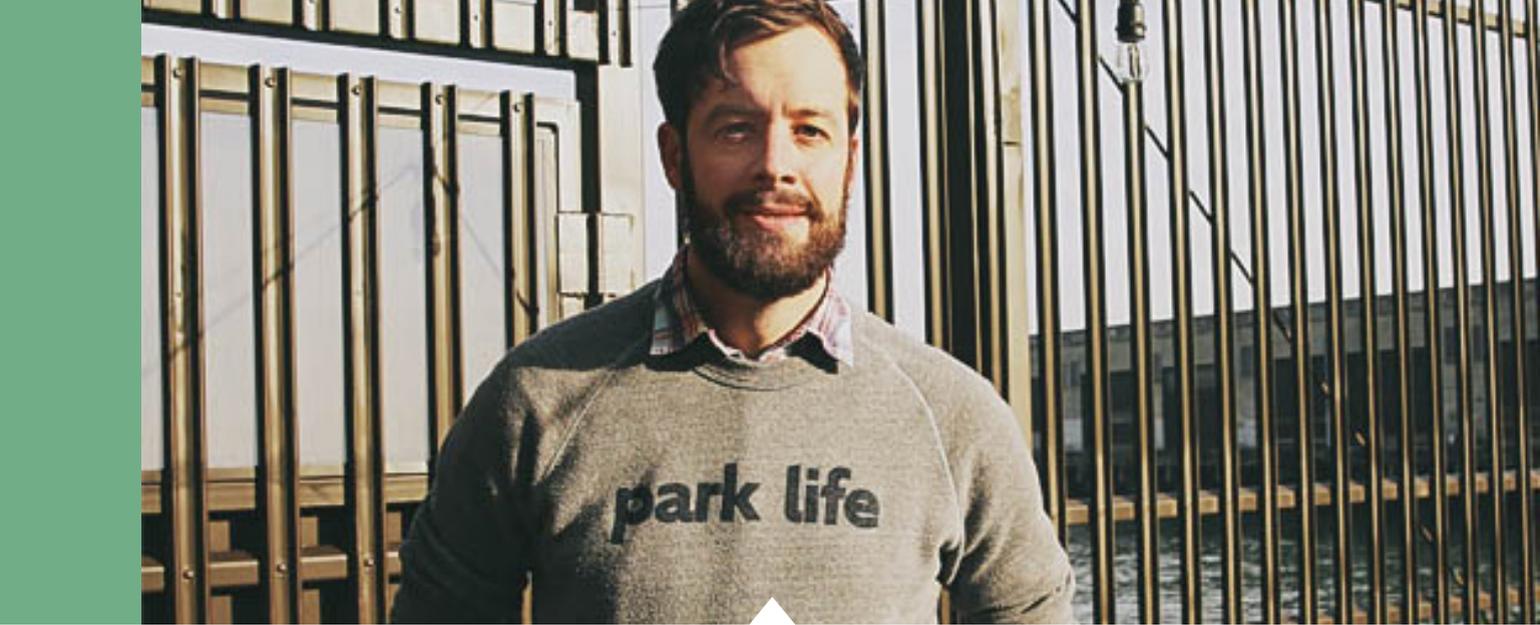


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Canada



2013 Failure Report

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Introduction: Fail to Learn

Sean Hewens, Amplify Program Director + In-House Counsel, IDEO.org

Four years ago, I started a non-profit aimed at building solar-powered computer labs for schools and libraries in East Africa. I found a partner organization in Tanzania and a willing headmaster who was excited to have ten shiny new computers and accompanying solar power system installed at his school. I pitched donors from the United States who were also excited by the idea and who donated enthusiastically to make it happen. After six months of extensive planning in Boston, my team travelled to Tanzania, spending two weeks building the computer lab and training students and staff how to operate it. And then we left.

Ants ate my computer lab

Six months passed before I returned for a site visit, where I learned three of the com-

puters had been stolen, two had been eaten by ants, and two were so full of spam and mysterious viruses that they wouldn't boot past the startup screen. Only three of the ten computers were still operable, and they were locked inside the principal's office to ensure they stayed that way. One year after we started the project, not one person in the school, or the community, was benefitting from the computer lab that cost \$50,000 to build. This is what failure looks like.

It's important to remember that four years ago, failure wasn't a mainstream term in the development sector. The EWB Failure Report, first published in 2008, was at the leading edge of this method of study. Indeed, even by 2010, talking about failure was still something to be avoided. This was true in my case as well. I never told this fail-

ure story while our computer lab was failing the community it was supposed to be helping. I also didn't talk about the failure at my non-profit's quarterly board meetings or as part of our annual holiday fundraising email to the donors who had made the project possible. Instead, I told the story for the first time three years after it had occurred, when I had moved on to the non-profit design firm IDEO.org and was asked to give a talk on human-centred design to a group of social entrepreneurs in San Francisco. These three years of silence may have been totally understandable, but they were also unforgivable.

Big-F Failure versus small-f failure

As we think about failure and the role that it plays in helping us to deliver more impact-



ful and more efficient poverty alleviation solutions, we should consider two distinct vantage points.

Tackling poverty around the world is hard. Despite our best intentions, most of the time we will fail at this enormous task. This big-F Failure should be acknowledged as an unfortunate, yet integral, part of our ecosystem. Instead, perverse funding structures in the social sector—notably, the frequent separation of donor and beneficiary—make big-F Failure a too-often, taboo subject. And let's not forget our basic hardwiring; no one likes to fail, let alone admit failure to others. It's not easy to stand in front of a room of earnest world changers and confess a big-F Failure, no matter how big or small the podium. Yet, by doing so, we can transform big-F Failure from an elephant in the room to an invaluable teaching moment.

The second type of failure is small-f failure, which I call “prototyping.” Imagine if my team in Tanzania had arrived in that village, not with a finished computer lab, but with a set of simple yet immersive prototypes such as brochures, pricing plans, or even play-acted mockups of what using the lab might be

like. We could have failed in a hundred ways, but it would have been early in the design process, in a controlled manner, and at limited cost. Ultimately, with assistance from the community, and by embracing small-f failure, we could have quickly learned how our initial designs didn't work—and then iterated and improved our computer lab to ultimately create a much higher likelihood of success. Small-f failure is the best tool for preventing big-F Failure.

Toward a human-centred approach to failure

Looking back on my first project in Tanzania, there are so many reasons that the project was a big-F Failure. We failed to learn in advance what sort of computer lab they might want in their school (instead, we made assumptions from 8,000 miles away). We failed to design sustainable systems for fixing computers that broke down, missing out on an opportunity to create jobs in the community. We also failed to consider how expensive new computers in a poor village might impact the social dynamics for the students and teachers with access to the lab, and for the much larger percentage of the village that did not have access. Finally, we failed to prototype in any way, arriving instead with a \$50,000 “finished” idea that wasn't right for the users in this small Tanzanian village.

Human-centred design is an approach to innovation that places humans at the centre of the design process. Each project at IDEO.org begins with community immersion, so that we can understand the hopes, needs, and motivations of our users. Once we start generating ideas and building prototypes, we return to the community as frequently as possible, gathering feedback via small-f failures, and then refining and iterating our designs until we get them right.

Human-centred design is, of course, not a magic bullet. I could stand at a different po-

dium tomorrow and tell you many IDEO.org big-F Failure stories. Yet, I firmly believe that our strategies for rapid prototyping and emphasis on the community-oriented process of human-centred design—alongside the failure stories in this report—offer a roadmap for the social sector to begin failing in the right way.

Coming out of the failure closet

What if, after my first project had failed in Tanzania, I'd remained silent? Would the fact that my organization wasted \$50,000 of donor money, and failed a community in Tanzania, have been any less real than if this story was never told? Of course not. Yet, the likelihood of these mistakes being repeated again by another organization in another village would have been that much more likely. This all-to-common occurrence in the social sector was captured perfectly by Sarah Elizabeth Lewis in her 2011 Foreword to the EWB Failure Report: “A mistake is made somewhere in rural Tanzania. It is not publicized—a donor might be upset. Two years later, the same mistake is repeated in Ghana. Six months later in Mali. And so the story continues as it has for over 60 years.”

Both human-centred design and EWB's Failure Reports offer a critical first step in getting the social sector to embrace small-f failure, while acknowledging and helping us learn from the wrong sorts of big-F Failure. Let's also recognize that big-F Failure will always be with us. Projects—big and small—will go wrong. What is preventable is repeatedly failing in the same manner. I urge every reader of this report to take this as a call to action. In 2014, repeating the same failure is both preventable and unforgivable. We need to talk about failure. We need to learn from failure. And we need to design ways to ensure the broader social sector comes along for the ride, not just those reading this report. Let's make this a movement. Failure is not the enemy. Silence is. 🏠



Introduction: **Striving for Humility to Achieve Big Dreams**

EWB Canada Executive Team

At EWB, we dream big and work hard. This is one of our values. We strive to make the impossible possible through imagination, hard work, innovation, passion, and a willingness to take risks.

Of course, with risks and big dreams comes failure. At EWB, we celebrate failure as much as we celebrate success, because we believe that through failing—and, the learning that comes from it—we will achieve our goals.

Failure, admitting failure, learning from failure—these are not easy to pursue. “Failing forward” is the term we use in ascribing failure to progress, and this progress requires a significant degree of another of our values: humility. That’s why, at EWB, we encourage learning by

being open about our mistakes.

Our Failure Report typically captures the failures from one part of our organization, when in fact, their underpinnings are often more systemic. We write failure stories because they help us speak candidly, which is a necessary part of learning, and of realizing our dreams.

Writing about failure is only the beginning, never the end, of a cyclical learning process. But, the Failure Report in itself does not institutionalize or operationalize this learning. Instead, the Failure Report succeeds most when it acts as a launching pad for a courageous and reflective process aimed at identifying the systemic problems and developing effective strategies for dealing with them.

Take, for example, Courtney Robinson’s story of failure in monitoring and evaluation. Over the years, EWB has worked to establish strategies that will help measure the impact of our ventures—and of our organization as a whole—and to identify the extent to which this support should be offered so that it won’t be restrictive or unhelpful. Yet, this story makes apparent that our progress here has been inadequate. The story demonstrates an acute symptom stemming from a systemic failure in our organization.

This year’s Failure Report also includes a story from us, the executive team, about the cash-flow crunch we faced during a low revenue year. In doing so,



we seek to honour and practice the humility that we encourage throughout the rest of the organization. More importantly, we have learned about our weaknesses and taken steps to remedy the situation. Our story is only one small part of a continuous learning process that we'll take with us into 2014 and beyond.

This year's Failure Report describes a number of other acute failures. Sean Hewens, Amplify Program Director at IDEO.org, writes about a type of failure that is all too common in social development planning: we forget to put the lives of those we aim to improve at the centre of our design. It's a lesson we've learned from in the past. Yet, we still fail at it. Several of this year's stories, including one from our WatSan venture in Malawi, speak to this point. Hewens offers discussion on rapid prototyping to embrace our failures early in the design process. By accelerating the process of "fail, learn, repeat," we can test and adjust our meth-

ods, uncover new hypotheses, disprove assumptions, and learn more rapidly to improve the final product.

Sometimes, we can get those first iterations done in "safe" environments—through simulations, prototyped designs, and so forth. This year, we completed our first, full cycle in allocating resources to our on-the-ground change ventures. We made mistakes throughout this process. In some cases, we could have predicted—and avoided—these mistakes through more effective, "safe" prototyping. In other cases, we learned our lessons the hard way—through our implementation, which created challenges for our ventures. We highlight this failure in the report, as well as the lessons we plan to bring into our next iteration in 2014.

While it can be tough to say "I failed because I didn't understand the very person or people I thought I was working with," or "I failed because I made

assumptions and hypotheses that were wrong," the greatest challenge is admitting when our personal failures prevent us from achieving big dreams. While it may seem strange to discuss personal failures in a public report, we believe that this doing so is foundational to our work. To change systems, we must start with ourselves. And, while many stories touch on elements of personal failure, Mark Abbott, EWB's VP Talent, makes this a direct focus.

We hope that these stories inspire you to speak more candidly about, and learn from, failure—individually and as a team. In striving for humility we will achieve our big dreams.

Yours,
The EWB Executive Team
George Roter
Mark Abbott
Alexandra Conliffe
Boris Martin



Fair Trade Coffee Stand

Tanys Byrns, University of Saskatchewan Chapter

This past school year, the EWB University of Saskatchewan chapter piloted a new way to spread awareness and generate support for EWB and fair trade on campus: we started selling fair trade coffee.

Every morning during the school week, we set up a fair trade coffee stand in the Engineering building, where coffee was made available by donation. An EWB chapter member brewed 36 cups of coffee and set the coffee dispenser on a table with a donation jar that read, “Life isn’t always fair, but your coffee can be.” The coffee station was then left for about three hours. A chapter member would then return to clean up and put away the coffee stand.

The goal of the coffee stand was to raise awareness of what EWB does, and why we support fair trade. Unfortunately, due to a number of factors, our chapter agreed that the project had been a failure—but one we could learn from.

Why was the coffee stand a failure?

1. We wasted a lot of coffee. We overestimated the amount of coffee needed each morning, as the demand for coffee was not nearly high enough to use the amount we brewed. Each day, there was usually more than half of the coffee left in the dispenser, which then had to be poured out.
2. We did not use the coffee stand to advertise anything about EWB: what we are, what we do, or why we support fair trade. Our small sign did not provide any information on fair trade, and we didn’t have any EWB members present to engage the public.
3. No one managed coffee sales. We didn’t assign anybody to oversee sales, troubleshoot, or evaluate any benefit. Since no one was responsible, we continued to operate the stand even though we didn’t know if we were having any impact.

What have we learned from this failure?

We’ve learned that it is important to examine the “why” before starting a project. It’s crucial to understand and agree on why we are doing what we are doing, and to ask questions such as: What are our goals? What kind of impact do we want to have? Will the project benefit our target audience and us? If so, how?

We learned that it is absolutely necessary to have someone oversee the project. Having someone accountable for the project allows the “why” to be continually re-evaluated. Someone must monitor the successes and failures of the project, and make suggestions as to how it might be improved if something is not working. If goals are not being met, this is brought to the attention of the group, and the necessary changes are made. Otherwise, we end up with a really good idea that doesn’t reach its full potential. 🏠



The Frailty of Innovation

Sydney Byrns, Water and Sanitation Venture Staff, Malawi

In 2011 and 2012, the Malawi WatSan Venture partnered with the Mangochi District Water Development Office to address the challenge of having communities invest in safe water sources. We worked together to develop a new workshop called Water Investment Triggering (WIT) to encourage communities to allocate money to pay for regular maintenance of their water pumps. WIT builds on techniques that government staff were already using in sanitation programs, which were focused on inciting communal shame, fear, and disgust of drinking unclean water. WIT facilitated discussion, debate, and the creation of community action plans. We tested the program in five communities, and four reactivated their local water committees to collect funds for maintenance and repairs.

Despite initial successes and the government's well-intentioned plans to continue WIT, it was not incorporated into their routine activities after EWB left. When we followed up in Mangochi to see why the government

was not continuing WIT, it became clear that although WIT was respected as an excellent program, it was seen as an additional activity rather than something that could be incorporated into their regular activities.

We had added an innovation onto the system, rather than building an innovation into it. We fell into the trap of trying to initially solve for an end result. Though we had used existing structures to develop an intervention with our partner organization, which they were excited about, we had created new activities and responsibilities rather than remodeling those that were already in place. Had we first examined how existing activities could be modified to better address the issue, we believe those changes would have stood a better chance of being institutionalized.

This lesson has influenced how we engage our government partners. Our work now starts with looking at how existing management processes and responsibilities can be leveraged, rather than assuming that part-

ners will find time to continue an additional field intervention. We have found that this strategy is more likely to achieve lasting impacts.

Key insights:

- In building onto systems, we often end up with exciting but unsustainable interventions, which fail fast when external support leaves. By building into existing institutional systems, new practices can be sustained.
- It's important to keep end goals in sight, but to start from pre-existing systems and processes; how can these be improved to hit the target outcomes?
- Innovating from what is already in place is important in creating real systemic change; this doesn't necessarily require creating a completely new innovation. Lasting change can come from doing what you already do, but by doing it better. 🏠



2013 Kumvana Program

How we re-created the same barriers that female leaders face in Africa

Florian Villaumé, Director of Talent Enablement

This is a story about our failure as organizers to recognize the barriers that women faced in accessing EWB's Kumvana Program. In the last three years, 37 African Leaders have participated—and only five of them were women. We decided this needed to change.

The Kumvana Program builds the capacity of EWB's young African partners to achieve greater impacts. During the seven-month program, Kumvana leaders have access to a curriculum focused on systemic change, a 360 feedback process, mentorship and coaching support, and

networking opportunities with past Kumvana leaders. Some participants then travel to Canada in January for an intensive four-week experience that includes EWB National Conference, leadership programming, and two work placements with pertinent Canadian organizations. They return home with new skills, ideas, contacts, motivation, and required means to create change within their own organizations and communities in Africa.

Last year, we received feedback from EWB staff members who tried to nominate women to the program but could not due

to challenges in our programming and selection process. This was unacceptable to us. Women of all ages are especially subject to the worst forms of poverty; they are also more likely than their male counterparts to invest back in their communities when given the chance. The lack of women in the Kumvana Program meant that there was a significant gap in our effort to fight poverty. We were missing out on engaging different leadership styles and inadvertently strengthening, rather than transforming, the existing male-dominated power relations in Canada and Africa.



2013 African Leaders. Tamala Zembeni, the only female African Leader.

After the 2013 Kumvana Program ended, I met with several leaders with backgrounds in gender studies to understand how we could improve. Through conversations with Pauline Achola (former Program Director for Women's Leadership at the Coady International Institute) and EWBers such as Erin Aylward and Stephanie Bracken, I realized that many women faced barriers in being nominated and selected for the program. While many of these constraints lay beyond the Kumvana Program (for example, women's access to education and lack of formal employment), some of them were in our control.

1. Childcare costs for absent mothers: Women take on the majority of childcare work in Africa, which made it difficult for mothers to commit to the program.

2. Bias toward extroverts: One measure we used to evaluate applicants was extroversion. This created an advantage for male candidates, since

many of these women are expected to speak less than men and may be judged for speaking too much in public.

3. No communications seeking women for the program: Inaction supports the status quo. By not explicitly sharing our intention to include women, we were supporting the existing power imbalance, which goes against our values as an organization.

4. Age limit too low: We required that participants be 40 years or younger, but many women have longer career paths as a result of their parenting duties and the challenges of advancing within male-dominated environments.

When these constraints became clear to us, we changed our program accordingly. For the

2014 program, we worked to explore the challenges that a breastfeeding mother would face in joining the program. We

advertised that we would cover childcare costs. We replaced the extroversion requirements with criteria that value more subtle leadership qualities. We extended the maximum age limit to 50. And, we explicitly communicated our desire to recruit more women. As a result, six of the 43 candidates nominated for 2014 were women, and five of the 15 African Leaders selected were women. Further, many of the male candidates have a strong background in gender issues and are committed to advancing women's rights. We are excited and proud of the progress we've made, but we recognize that we still have a long way to go.

This journey has been valuable for me. It helped me realize that I could unconsciously promote the unequal power structures in my work and in my personal life. It was an important reminder that we don't know what we don't know, and that we all have a strong ally that will help limit our negative impact on the world: our genuine curiosity, which helps us actively seek new perspectives that help nourish our life.

What I found most useful was to keep in mind the following questions: Am I promoting people that are more likely to be in a position of power? Is it acceptable?

These questions should also be asked in our organization: what aspects of EWB promote people that are more likely to be in position of power? Is it acceptable? 🏡

Women's leadership is vital to the creation of effective and socially just systemic innovations, yet women's leadership is so frequently silenced or challenged that I fear we are going to continue to miss these opportunities unless we are more explicit in addressing the systemic barriers that women face.

Erin Aylward, EWB Canada



Internal Systems Failure

As an executive team, we started 2013 with a strong sense of confidence and optimism. We had just invested significantly to increase our office's capacity. The Invested Partnerships Team (IPT), which leads our fundraising, had more resources than ever before. We had formed a team of portfolio managers who could run operations and support ventures in Africa and Canada with new efficiency. We had increased our Network team's ability to support our chapters and their individual leaders. And, we had accumulated an operating surplus of nearly \$1 million at the start of the calendar year—a significant increase compared to previous years.

We continued to dream big and work hard, and we counted on a strong financial year. We began supporting initiatives

in Canada and Africa that we had previously been unable to commit resources to. And, we allowed each team in the organization to innovate according to their strengths in EWB.

As the year progressed, however, it became increasingly apparent that some of our base revenue would not materialize, despite the efforts of the IPT. Our initial response was to redouble our fundraising efforts in areas that had received less attention, and the IPT delivered a solid effort toward this.

Unfortunately, despite our renewed efforts, we also encountered a perfect storm of events that included lower-than-expected revenues and cash-flow demands from ventures and teams that were front-loaded in the early months of the fiscal year. When it became clear we

EWB Executive Team

George Roter, CEO

Mark Abbott, VP Talent

Alexandra Conliffe, VP Operations

Boris Martin, VP Strategy + Investment

wouldn't have enough cash to run the organization, we called upon everyone to reduce spending. Initially, we cut operating expenses, but ultimately, we were forced to lay off two staff members and end near-term financial support for two ventures.

With emotions running hot, we felt pressure to identify the smoking gun—to place blame for the failure. We consulted our national office and Board of Directors. We learned quickly that there were many aspects of failure at play—operations, human resources, personal relationships, wrong decisions, factors exogenous to our organization. We went further, getting perspectives from all staff and venture leaders to ensure we understood not just the parts, but also the interactions between them.

We asked Ashley Good of Fail Forward fame to conduct a more in-depth analysis, which included 11 interviews and generated 34 recommended follow-up items within six core theme areas:

1. Tacit knowledge transmission between CEO and IPT
2. Cash flow modeling in the venture model
3. Disaggregated risk in revenue projections
4. Broad sharing of financial ownership and oversight
5. Management systems for financial operational excellence
6. Culture of asking for help and blowing the whistle

“As the year progressed, however, it became increasingly apparent that some of our base revenue would not materialize, despite the efforts of the IPT.”

For each category, we prioritized actions, assigned owners, and began evaluating them monthly.

Our analysis revealed that we failed by ignoring the critical interactions within our system. We had the necessary people, teams, and structures to deal proactively

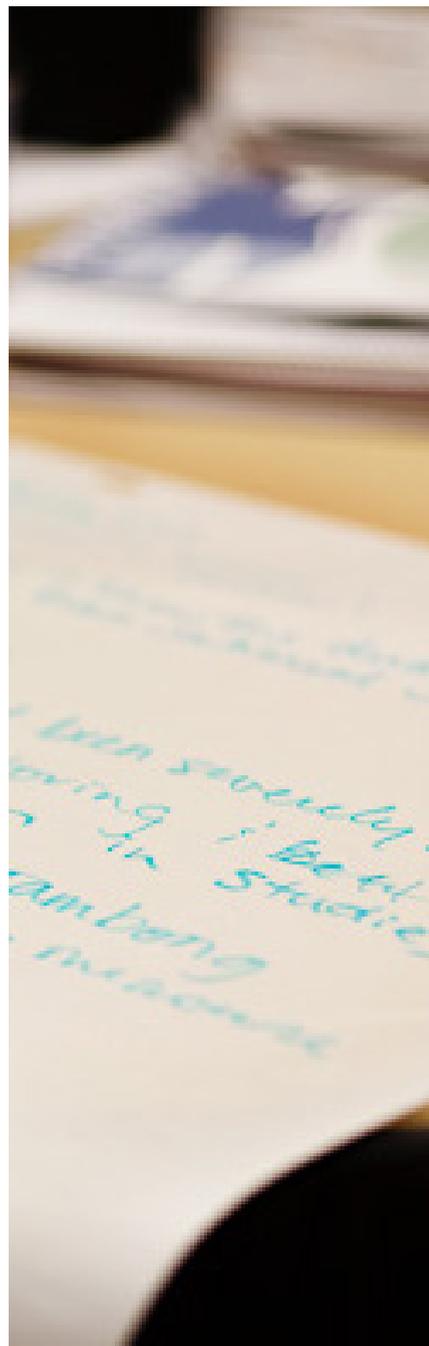
with financial changes, but our response was hindered by poor communication and a lack of clear roles for responsibility.

We focused on removing these blockages. From now on, venture leaders will have timely access to their budgets, an adequate understanding

of our overall financial situation, and the necessary financial literacy to use this information effectively. We also worked with team representatives to help project revenues for the year.

This process helped us to extend the scope of our regular interactions beyond our full-time members to include those in the broader EWB community. Now, we're building our monthly donor base within the community to improve financial stability and to encourage a sense of ownership over the organization's financial welfare—an area that concerns everyone.

The systemic nature of our financial failures guided our approach to analyzing and responding to the failure—ensuring we focus on systemic interactions and not just the parts. Although our actions will not fully insulate us from factors outside our control—such as economic slowdowns or inevitable variability in our performance—we believe that we have created a wiser, more resilient EWB. 🏡







A Failure to Grow Up

Simon Fauvel, Patrick Miller, Lauren Quan, and Sierra Jensen
National Conference Planning Team, 2013

In October 2011, a group of current and former EWB leaders came together to plan and organize EWB's 2013 National Conference. We aimed to host a conference that would set a new standard for our organization, establishing a new benchmark for professionalism. EWB was growing up, and we wanted to make sure that its conference would too.

Our team grew through the fall of 2011 and finally met in Ottawa in January 2012. Despite being anxious about the work ahead, we were confident that we could achieve our goals.

We were incredibly ambitious. Unfortunately, our professionalism and execution did not live up to our ambitions. These shortfalls manifested themselves in many aspects, but especially in our sponsorship efforts.

We had a grand vision to connect our new corporate partners to EWB in ways more substantial than ever before. Our team was excited to embrace the idea behind Invested Partnerships, a new direction for EWB's fundraising team. Our partners would share their expertise about running projects and building teams; we would create spaces for poignant conversations and open dialogue; and we would make sure all sponsor delegates had enough information and context to participate in the conference community.

As we approached the deadline for conference planning, we were a long way from achieving our goals, and our ambition had disappeared.

We struggled to communicate our partnership vision to our sponsors in a way that made sense to their representatives. We failed to bridge the gap between their perception of EWB and our goals. We also didn't give our partners

the basic information they needed to fully invest in their experience with us. Because of these failures, corporate representatives were not set up to give the presentations that would connect with the conference audience.

We also struggled internally to meet our own timelines for creating and articulating the ways for sponsors to contribute to the content and atmosphere of conference. We operated in a detrimental environment of last-minute planning, which did not help in working with external stakeholders.

Despite having clear deadlines, we kept pushing them back until we ended up against the December wall; while we worked hard to pull everything together in the last few weeks, our corporate contacts and sponsor delegates were too busy finishing their own projects leading up to the holidays. Our last-minute efforts to fix our mistakes turned out to be too little, too late. Our partners did not have enough time to make the most out of their experience with us.

In short, as a team, we were unprofessional. We didn't provide our partners with the information they needed. We left everything to the last minute. We made promises we didn't keep. Our lack of professionalism hindered our dreams and hurt our corporate relationships.

As leaders, we're learning to respect our partners and to meet and exceed the promises that we make to them. We're learning to respect each other enough to meet our internal deadlines and quality standards. We're learning that working in an organization of volunteers cannot be an excuse for unprofessional practices. We're learning to grow up. 🏠



Walking the Walk on Transparency, Part II

Sam Burton, Advocacy Manager, EWB National Office

James Haga, Director of Policy & Advocacy, EWB National Office

Ashley Hardill, former Finance Manager, EWB National Office

Alyssa Lindsay, Venture Leader, Water and Sanitation Venture, Malawi

Duncan McNicholl, Venture Leader, Water and Sanitation Venture, Malawi

Owen Scott, former Water and Sanitation Venture staff

For the first chapter of this story, we need to go back to EWB's 2011 Failure Report, where we first wrote about EWB's failure to "walk the walk" on transparency.

A quick flashback:

- In 2010, EWB threw its weight behind a nationwide campaign, asking Canada to join and publish to the International Aid Transparency Initiative (IATI). The more we pushed others to be transparent, the more transparency became important for our own operations.
- In November 2011, EWB committed "with minimal understanding of the endeavour" to publish our own data to the IATI standard. That year, Canada also officially

joined IATI and the country's aid transparency began to steadily improve. But EWB didn't move forward at the same pace.

- In the 2011 Failure Report, James Haga said that EWB struggled to consistently publish to the IATI standard because, "We failed to establish a long-term process, [and instead continued] to rely on the spontaneous efforts of our volunteers and staff... We failed to invest enough resources to integrate [strong information management systems] at EWB. Moving forward," the story concluded, "it's paramount that [EWB] build a process to consistently publish to the IATI standard."

Two years later, after several attempts to

build this IATI publishing process, EWB still struggles to "walk the walk" on transparency.

At different times, everyone contributing to this story has done his or her best to champion IATI publication at EWB. But since it wasn't ever an official responsibility (except for one two-month stint—see sidebar), it has always been one of the first tasks to be dropped.

In April 2013, we, the authors, joined to write a set of recommendations on how to make IATI reporting sustainable for EWB. The EWB Executive Team supported our recommendations, but ultimately, the result was largely a repetition of the 2011 experience, where desire and intention failed to manifest themselves as a sustained organi-

zational change.

In the wake of this experience, we've come together again to get to the bottom of this persistent failure and to extract everything we've learned from it.

Simply put, our major failure, which started when EWB first committed to publishing to IATI, was that we didn't assign clear accountability for, or ownership over, making IATI compliance happen.

Systemic challenges further amplified this failure. We learned that the current IATI Standard is better suited for big donors than for individual non-governmental organizations (NGOs) like EWB. There is also a gap in user-friendly, low-tech tools to help NGOs—which rarely have resources to develop custom tools—make sense of, and easily report to, the IATI Standard.

EWB did invest in developing tools for IATI reporting, but while the tools may be technically effective, we learned that good tools don't necessarily produce strong process. Our process failed because no one was truly accountable for implementation—or had the technical capabilities required to sustain IATI compliance. Furthermore, nobody had ever fully appreciated the amount of data collection required for a decentralized venture-based organization like EWB.

The main lesson we've learned is that EWB needs to plan not just for the next step, but for the next 100 steps. With IATI publication, we consistently failed to evaluate the long-term impacts of our commitments, even as we continued to renew and tweak them. We also

didn't explicitly define indicators for success, which would have helped ensure that our goals were both ambitious and achievable. If we had done these things, we would have discovered there was no team at our national office that could have taken on the task of IATI publication. Left unchecked, this led to a lack of accountability, which resulted in repeated failure.

We've also learned that, sometimes, we need to let go. IATI reporting took more resources than we anticipated or were available. There are other ways that EWB can continue to support the aid transparency movement, but to do this, we may also have to accept our inability to meet these commitments ourselves—at least for now.

We (and many other EWBers) still believe that accountability and transparency are vital to sustainable, inclusive global development. The EWB community played a central role in pushing the former Canadian International Development Agency (CIDA) to sign on to IATI—and to invest in its effectiveness as a global standard—at a time when it was a vital step for our country to take.

We remain committed to supporting this movement, in Canada and internationally. Still, in the near term, it is unclear whether we will prioritize continued IATI compliance. We must also decide whether our own IATI compliance will be a long-term priority moving forward. If it is, we're fortunate to have plenty of experience to draw on. 🏠

The right shoes for the walk

Owen Scott

Every big failure is composed of smaller ones. In 2012, I was hired for a two-month contract to help EWB develop a system for IATI publishing. IATI reporting is no small task: every quarter, someone needs to collect data from our operations throughout Africa, and then publish the resulting mash-up in a specific file format. To make this sustainable, EWB needed a user-friendly combination of software and human processes.

My idea was to build a system based on Excel and Visual Basic for Applications (VBA); EWB staff would be familiar with Excel, and VBA would handle the automatic IATI file creation. But after weeks of effort, what I designed wasn't a user-friendly solution for my clients, the staff of EWB's National Office. I had certain tools and approaches that I liked (having used these tools for years in Africa), and I built a solution based on my own comfort zone instead of seeking to understand my client's unique needs. The basis for my approach had worked well in rural Malawi—a totally different context—but it wasn't appropriate for the EWB National Office.

Development practitioners take heed, as this epitomizes a mistake that is made all too often in our work. We should seek to better understand the people and contexts we work with to deliver effective solutions. We can't assume the solutions that are most convenient for us will address the needs of the people we seek to help. The solutions to challenges in Malawi won't necessarily be effective at addressing the same challenges in Canada—and the reverse is certainly true as well.



Internal Attachment Program: Monitoring and Evaluation Failure

Courtney Robinson, Agricultural Extension Venture Staff, Ghana

One of our main projects for the Agricultural Extension and Advisory Services Venture (AgEx) in 2013 was the co-development of a new internal attachment program at Kwadaso Agricultural College (KAC). The program aimed to develop problem-solving skills among KAC students and to provide opportunities for greater community engagement. It also aimed to build empathy among students for rural farmer livelihoods.

In addition to qualitative evaluation, I was excited to do a quantitative analysis on how student perceptions of rural livelihoods changed as a result of the program. The data would help encourage other agricultural colleges to implement the program. If the data showed these types of programs were effective, it would also make the program more attractive to potential funders (for both AgEx and KAC). As Principal K. Kontor said, “If we are able to give the heads of institutions copies of that quantitative data, then they might

decide to take up the program themselves.”

Using a Likert scale, I designed a survey to collect the data. Unfortunately, after several weeks of surveying, I realized I could not use the results in any meaningful way. This was because I had not designed the surveys properly, nor had I realized how difficult it would be to rigorously measure the Likert scale results. We were left to make qualitative statements about the program’s success based on self-identified changes—without the statistically determined differences we had hoped to measure. While the qualitative information was well received, there was a huge opportunity lost in terms of having the in-depth data to share with potential partners and funders.

I personally failed to devote the time to design a good quantitative analysis at the beginning of the project and failed to reach out to experts that could have





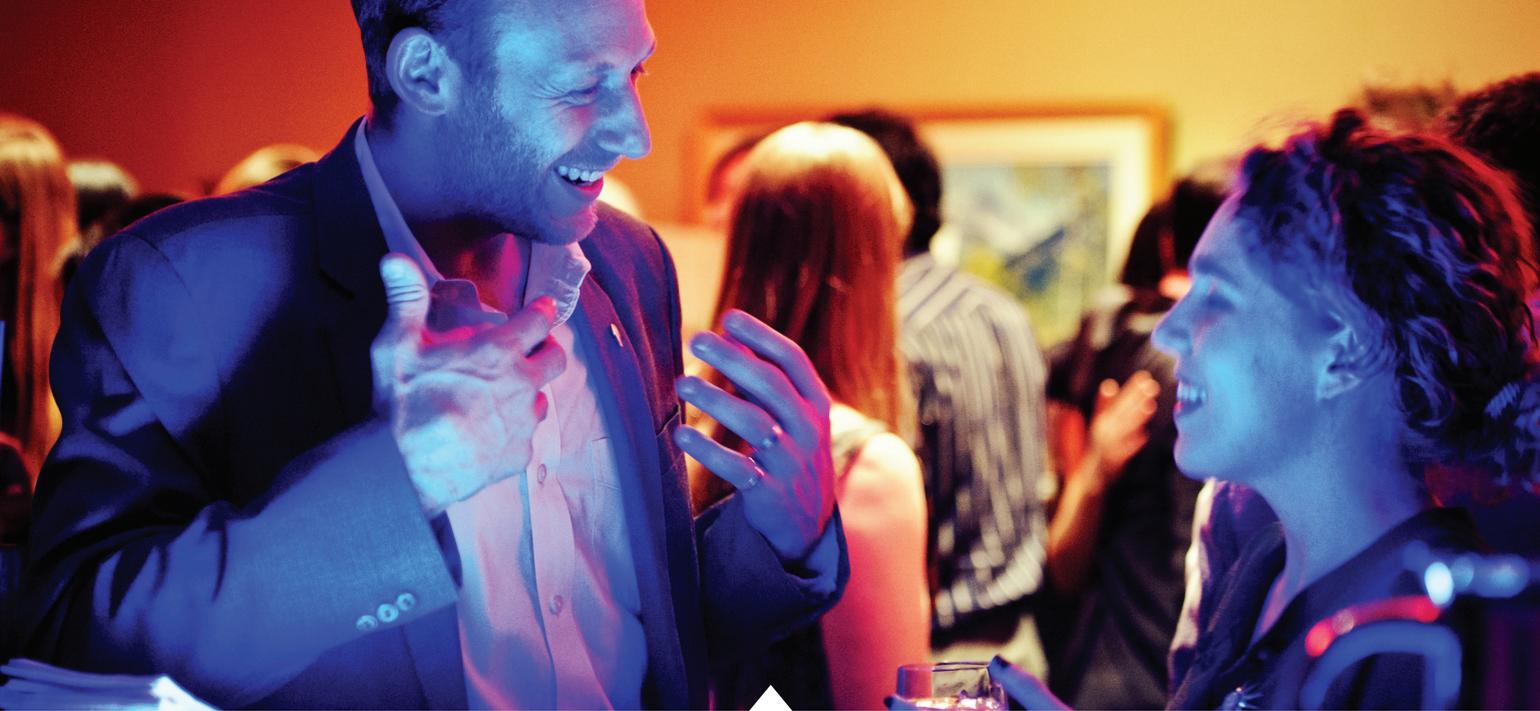
helped guide my process. However, I believe this failure may be relevant to other ventures and the organization as a whole.

Boris Martin, Vice President of Strategy and Investment, said EWB has been working with this challenge since 2005. “We’re at a stage where 18 months ago we decided to have the M&E practices come from the bottom up—ventures iterate on their own systems, and then support from our team comes later. This bottom-up approach was arrived at after having attempted a few times to have one system for all, which was rejected by ventures.”

While I agree that monitoring and evaluation (M&E) should be specific to each venture, and therefore from the bottom up, is there a way we can do a better job of setting up EWB ventures for success in quantitative M&E? Ventures—especially those needing to do rigorous evaluations and statistical analyses—would have much to gain from having the resources to ensure proper M&E. Our partners on the ground, donors, stakeholders, and most importantly, Dorothy deserve to see that our projects are having positive results. I will be finishing my time with EWB in January, and therefore, won’t be around to push this forward. So, for those who might be in a similar position, and would like to invest in the organization’s capacity for M&E, I urge you to pursue one of Boris’s suggestions below—or seek additional M&E support from the organization.

Boris’s suggestions:

- Connect with EWBers Luisa Celis and Jenn Hiscock. They are setting up a way for EWB to better retain its collective wisdom and to share knowledge around recurring questions.
- Collect existing wisdom on M&E practices, synthesize what’s been done, and propose a plan for going forward. Our national office has many past notes—and people like Ben Best, Francis Kung, and Anthony Candelario are great resources.
- Finally, suggest to the leadership team that M&E investment be considered in the resource allocation process. 🏠



Leader Shift

From Co-founder to CEO

Three years ago, I began a leadership transformation like none I'd experienced before. After 10 years as part of the most special leadership partnership one could hope for, my co-founder and co-CEO Parker Mitchell moved on, and I became the sole CEO of EWB.

At the time, I clearly understood two truths.

First, strategically and operationally, I knew that EWB was at a turning point. We needed to develop a new vision and strategy, secure new financial resources, strengthen processes, renew our staff and Board of Directors, develop a new talent/career progression structure, engage a new generation of EWBers, refresh our brand and messaging, and so forth.

Second, I knew my own leadership was at a turning point. In order for the organization to thrive, I needed to make the transition from being the co-founder of EWB, to being the CEO of EWB. Search “founder to CEO transition” and it doesn't take much to discover a range of opinions and advice, from “it's not possible, just quit” to six-step plans that appear straightforward to implement. From everything I read, I knew the shift would require mindset and habit changes, shifts in how I used my time, and, fundamentally, forming a new relationship with EWB.

Of course, these truths were inextricably linked. The strategic and operational changes would not be easy. Even though EWB has an incredible ability to adapt,

George Roter, CEO

change is rarely comfortable. Maintaining a healthy and unified organization would, in part, depend on my leadership and my successful transition. I realized, however, that this past year I failed in numerous ways to make this shift.

Building and empowering a leadership team

I knew having a strong and effective executive/leadership team was important from the moment I took the reins as CEO. While forming an executive team was easy—Boris Martin and Mark Abbott had stepped into executive roles with gusto—for nearly two years something just didn't click. We each performed our individual responsibilities, but we didn't provide unified leadership on overall vision and decision-making.

About halfway through this past year, I realized part of this dysfunction was due to my failure to make a critical shift in mindset; being part of a team means that we all succeed and fail together. The moment I really understood this occurred in April, when it became clear we were at serious risk of not delivering on our revenue plan for the year. During an emotional meeting, I said something to the effect of, "Sorry guys, this is my fault, and I'll go out and fix it." An eye-opening response came from Boris, "No, this is the responsibility of our team."

Despite having strong people around me, I still believed I needed to take on all the responsibility. I had failed to become a member of our own empowered leadership team.

Separating EWB's identity from my own

For the past 13 years, EWB has been cen-

tral to who I am. My vision and values have been tightly fused with those of our organization.

In making the transition to CEO, I knew it was crucial to separate EWB's vision from my own. Certainly, I would contribute to crafting our vision and values, and I would be all-in for making them live and thrive. But for EWB to endure, it would need an

"I'm learning to trust my teammates, to separate my identity from EWB's, and I'm learning that sometimes moving forward requires taking a step back."

enduring vision and direction beyond that of any one person.

Having taken two years and involving hundreds of people, I worked to craft a vision for EWB that was beyond my own. However, I failed at separating my own personal identity from the vision we

had grown.

This failure became clear when many criticized EWB in its approach to engaging with corporate Canada. I wanted to avoid being defensive, being sure to create the space for EWBers to express themselves and explore ideas. But, I took the criticisms personally—as if they were attacking my commitment to EWB and my vision for the organization. With this tension, I withdrew from our discussions and became a non-participant, providing few thoughts and little leadership.

My reaction to this situation was emblematic of my larger failure to confront deeper issues of how I related myself to EWB.

A failure to step back

There was an overarching failure this year that hindered my leadership transformation—one that goes deeper into how I operate: my own, oft-rehearsed failure mode. When I notice that my leadership is not working the way I had hoped, I tend

to push harder and work harder. I hold on more tightly. I punish and reprimand myself by cancelling holidays and visits to our African ventures. These are responses that reinforce my identity—and that feel safe. They have always worked for me.

This more fundamental failure is what has held me back from greater progress on my leadership journey from co-founder to CEO. This kind of transformation requires clarity, conviction, and confidence; it requires trusting myself so that I can fully trust others; it requires the energy to be creative and hopeful—and, none of these come from simply working harder.

And so, starting in early December, I'm taking a month off. With our National Conference approaching, budgets for 2014 being decided, and the need to secure 25 percent of our entire year's cash in one month, December is one of the busiest months of the year.

It feels irresponsible to leave all of these projects behind, but I'm learning to trust my teammates, to separate my identity from EWB's, and I'm learning that sometimes moving forward requires taking a step back. 🏠





Failure: Learning from 2013 Venture Resource Allocation

Sal Alajek, Portfolio Manager
on behalf of the
Strategy and Investment Team,
National Office

This past year, we, the EWB Strategy & Investment (S&I) team, coordinated a process to allocate funding and other resources to systemic change ventures. The resource allocation process started in October 2012, and ended with decisions communicated to ventures in February 2013. We needed to analyze venture needs and make decisions on renewing support to ventures we had supported in 2012, as well as extend support to a group of new ventures. Ventures awarded resources via this process were to join EWB's 2013 portfolio.

We ran the resource allocation process, and after communicating the decisions in February 2013, the S&I team launched a learning and evaluation initiative to identify successes and areas for improvement. We used an external evaluation professional to lead a working group of EWB volunteers and staff. The working group produced a report (posted at myewb.ca/library) with a list of recommendations to guide EWB in designing and executing future allocations.

The working group identified two key

failures. Below is a description of what we learned and how the S&I team will address these failures.

Failure 1: Building the plane while flying it

The allocation process was designed based on a multi-team consultation in September 2012. While the process took many perspectives into account (such as inclusivity and bias), the S&I team nevertheless failed in aspects of its execution.

Despite our best intentions, we missed deadlines in providing application information and in sharing our decisions. During the interview process, we did not capture knowledge in a consistent way; beyond interview rubric sheets, we did not always complete detailed notes and action items. We also had poor communication with applicants, meaning we gave short notice to many qualified venture leaders to prepare budgets.

In surveying the applicants afterwards, two takeaways emerged: applicants felt we were “building the plane while flying it”—learning about the process while running it; and, we were running the process with a large number of applicants. In short, we took on more than we could deliver.

Our failure to deliver resulted in two main outcomes:

1. We made it difficult and time consuming to make quality decisions on resource allocation. Missing deadlines meant extending our timelines further and further, leaving less room at the end for additional discussion. The S&I team needed to re-consult with applicants to fill gaps in information, which caused even further delays. Our team’s energy diminished as the process intensified

in the last weeks.

2. We disturbed the level of trust between the S&I team and the venture teams. We intended to facilitate an open and honest discussion with applicants about performance, opportunities, and on-the-ground impact. These discussions require a foundation of trust between investors and investees that can only be built with adequate time and scope to reach a shared understanding. In our evaluations, it was clear that we needed to rebuild trust to facilitate positive dialogue between venture teams and the S&I team.

Our consultation with an external evaluator helped spark the following actions:

- Start the 2014 allocation process early with a strong focus on maintaining deadlines
- Create a more consistent structure for meetings
- Designate a process manager responsible for coordinating various parties
- Conduct regular reviews to address delays, changes, and unexpected issues

Failure 2: Wearing two hats

Our goals for the project were to avoid limiting applicants with rigid priorities and perverse incentives to tailor applications in

accord with what we wanted to hear. We had aimed to curate a space for applicants to openly discuss their learning and failures, while also soliciting polished sales pitches for funding. However, some conversations failed to strike the right balance between judgment-free learning in the interests of innovation—and in outlining well-defined criteria for rigorous evaluation.

Venture leaders reported confusion over our expectations. Some felt there was a lack of clarity in the criteria, and as such, felt unsure how to meet the objectives. Others reported being surprised when they entered our learning and collaboration spaces, expecting a process

of exploration, only to encounter strict evaluation. While our attempt to balance this tension unlocked creativity in some discussions, it did not succeed for every applicant.

The confusion resulted in missed opportunities. Space curated for dialogue and constructive exchanges was cut short in favour of decision-oriented evaluations. Unstructured evaluation spaces caused further confusion when final decisions were communicated.

Our attempt at finding this balance was an incredibly valuable learning experience, which we have used to structure our future interactions. We are now working to separate learning and strategy discussions from resource negotiations. Our goal is to continue learning and innovating until we reach a constructive balance that allows us to provide guiding principles for allocation, while leaving room for innovation through honest and open dialogue. 🏠

“Our goal is to continue learning and innovating until we reach a constructive balance that allows us to provide guiding principles for allocation, while leaving room for innovation through honest and open dialogue.”



How a Lack of Monitoring and Evaluation Made Us Miss the Big Picture

Meaghan Langille, Fariya Mohiuddin, and Sasha Caldera
Advocacy Distributed Team Members

In June 2013, the Advocacy Distributed Team officially convened with the goal of supporting the strategic planning, skill building, and leadership development of EWB chapter and city network advocates across Canada. After little more than two months of working together, interacting with advocacy reps and supporting the advocacy network, we stopped to ask ourselves, “How are we doing?” This question inevitably led to another one, “How should we evaluate ourselves?”

After some deliberating, we realized how difficult it would be to evaluate our advocacy support—and advocacy in general. We decided the challenge in evaluating our initial performance

wouldn’t be worth the effort, and that we were better off waiting for the tangible results from the #FixAid campaign, since we already had specific metrics in place.

Our mistake came to light during the fall retreat held for Student Chapter Presidents, when we had our first opportunity to interact face-to-face with chapter leaders.

We began our session with energy, but when the blind spots in our planning began to emerge, we quickly lost confidence. Some presidents felt the timelines were too tight, and others were completely unaware of our plans and the strategies behind them. In general, there was a lot of confusion surrounding the upcoming #FixAid campaign.

Until then, we had failed to ask advocates:

- How involved were their chapters?
- How informed were key chapter and city network leaders, like presidents, in the campaign planning process?

And, we had failed to ask ourselves:

- How informed, and invested, was the EWB community as a whole in our advocacy work?
- Were there gaps in our communication, and if there were, how would we address these gaps?

The presidents’ reactions at the retreat



made it clear we were out of touch with the rest of the EWB community. We were fortunate in that, had these gaps not been identified, our upcoming #FixAid campaign may not have achieved its potential impact.

Through this, we learned that, although advocates, and their team members, are our primary audiences and constituencies, as a distributed team, we need to place our work into the greater context of the EWB community. So how did we tackle this challenge?

First, we recognized that we needed to make ourselves more available and to have better dialogue with other members of the network, especially presidents. To address this, we have begun more regular communications with chapter presidents and have attempted to expand our timelines for campaign planning. We hope this will give us enough time to effectively share information, answer questions, and ensure proper planning is in place.

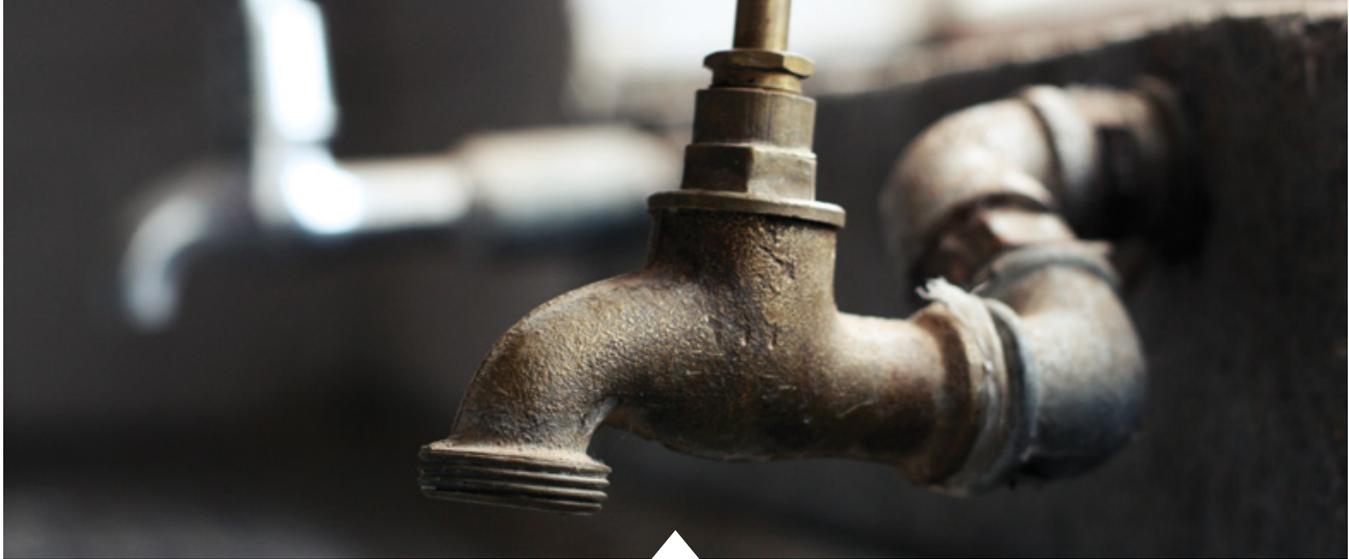
We also learned to account for the fact that members had varying degrees in capacity and energy to devote to campaigns. We developed an array of options that required different levels of commitment — ranging from basic member-learning activities to engaging directly with elected officials.

Finally, and most importantly, we recognized the necessity for a strong monitoring and evaluating framework to build into our planning and action timelines. Moreover, as a team, we are taking steps to map the network's capacities

and skills through coaching calls, surveys, and learning opportunities that will enable the advocacy team to develop a proactive approach to understanding of the network's progress and growth.

This failure reinforced the importance of overarching monitoring and evaluation protocol. It taught us to evaluate not only the campaign, but also our advocacy efforts as whole—and to better engage the EWB network. This will ensure we have a community of advocates that is continually learning and building from past experiences year after year. 🏡

“We also learned to account for the fact that members had varying degrees in capacity and energy to devote to campaigns. We developed an array of options that required different levels of commitment—ranging from basic member-learning activities to engaging directly with elected officials.”



Control Failure

Mark Abbott, VP Talent

Real failures are the ones that you don't learn from, even though you know better. For me, the pattern is always the same. Somebody, or a group of people, has a new idea that they're really excited about, and rather than join them in their excitement, I start asking questions—dissecting, and frantically trying to wrap my brain around it. I effectively throw a wet blanket on it before I've understood what's at the heart of their excitement.

Don't get me wrong. There are times when tough questions and practicality are exactly what's needed to guide and nurture an idea or put it gracefully to pasture. What makes these instances failures is that my questions and dissection come from a place of fear—fear that I don't fully grasp the idea and, therefore, that the outcomes are out of my control. This is a fear of not being capable of contributing, of being left behind, of being excluded. Fear of failure.

Sometimes, I am mindful in these situations—can sense my fear coming on and choose another path. I join the excitement,

explore unrestrained, add my own fuel and creativity to the fire. In other times, I'm less present, and I fail to recognize my fear.

The failure has multiple levels of consequence. I am less open and creative when I chase a false sense of control. It also suppresses the talent and creativity of those I work with, often compromising my relationship with them. Ultimately, it hinders the work of our entire organization, because if we're going to achieve the level of change we desire, we need to nurture disruptive ideas from that vulnerable first spark all the way up to the point where they rattle and shift whole systems.

In my defense, I'm often encouraged to seek control. The machine metaphor that dominates the design and culture of most organizations preaches it. If you're on top of things, as a manager or leader, you should be able to control outcomes (within reason). This type of thinking is powerful to a point; however, seeking too much control comes at a hefty price.

I am working on several practices in order

to be more supportive and open to new ideas. These practices focus on deepening my awareness and transforming my response. I try to be aware of when I tense up because I feel out of control. I ask myself, "What is underneath my uneasiness?" If the answer is fear, I practice asking myself, "What can I do in this situation to best serve the idea and the individual?" The answer can range from "provide pure encouragement" to "ask tough questions." Or, I might simply ask the person directly: "I can see that you're really passionate about this idea, can you help me to understand what's at the root of your excitement, and is there anything I can do to contribute?"

As individual Systems Change Leaders, and as a broader community that seeks to fundamentally change whole systems, we must continually practice our ability to embrace both chaos and order in a fluid manner. Losing control can be damaging, but seeking too much control can squander a brilliant idea—and that can be an even greater failure. 🏠

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